

Module 7

Chapter 6

Reports

Chapter Overview

Introduction This chapter explains the types of reports that are available in OTA, to include printing forms.

Chapter Contents

Topic	Page
Printing Reports and Forms:	2
Accessing Reports	3
Printing a DD Form 1556	4
Submitting Employee/Supervisor Evaluations	6
Managers Training Budget Report	7
Retrieving Training Cost Data	10

Who Does It



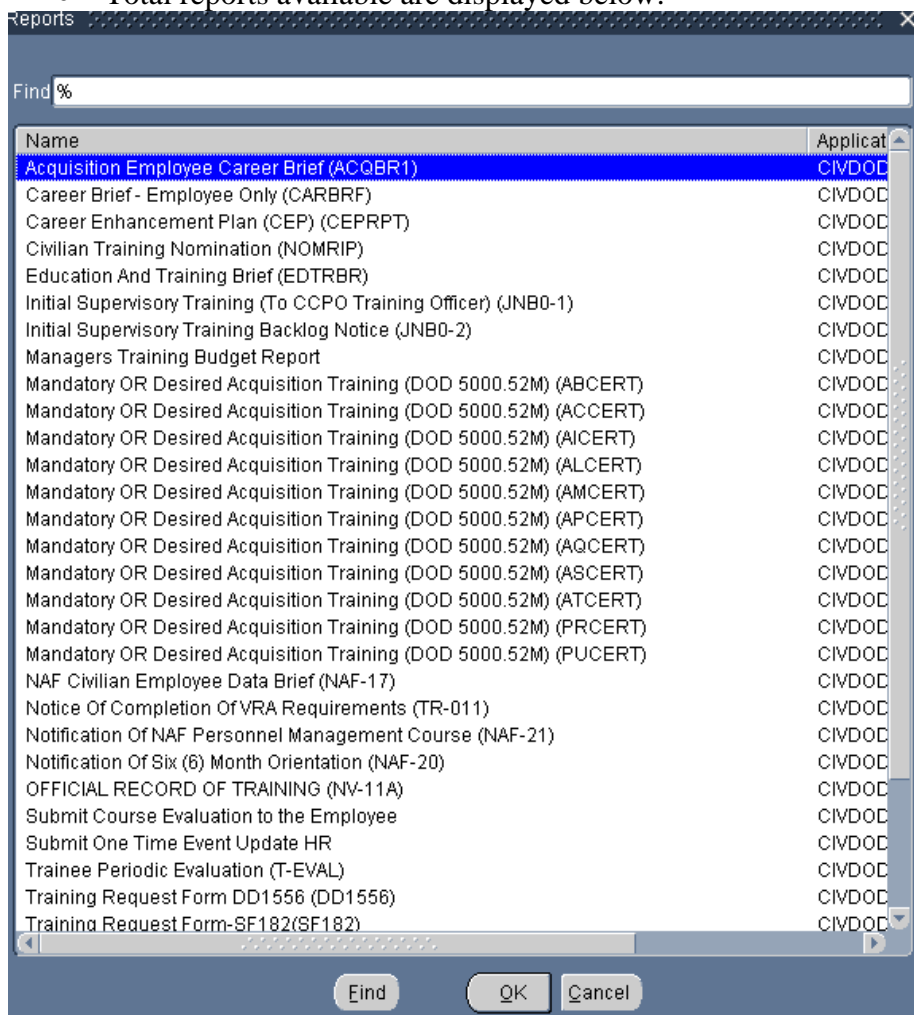
Components will determine the level of access to OTA, and specifically, to Reports. Specific reports are now assigned to each Responsibility as described in the Module Overview matrix.

Printing Reports and Forms

Purpose This section will guide you through the steps for viewing or printing reports.

Before You Begin

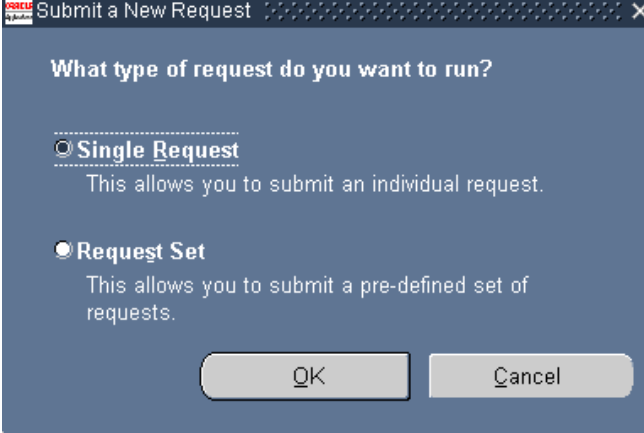
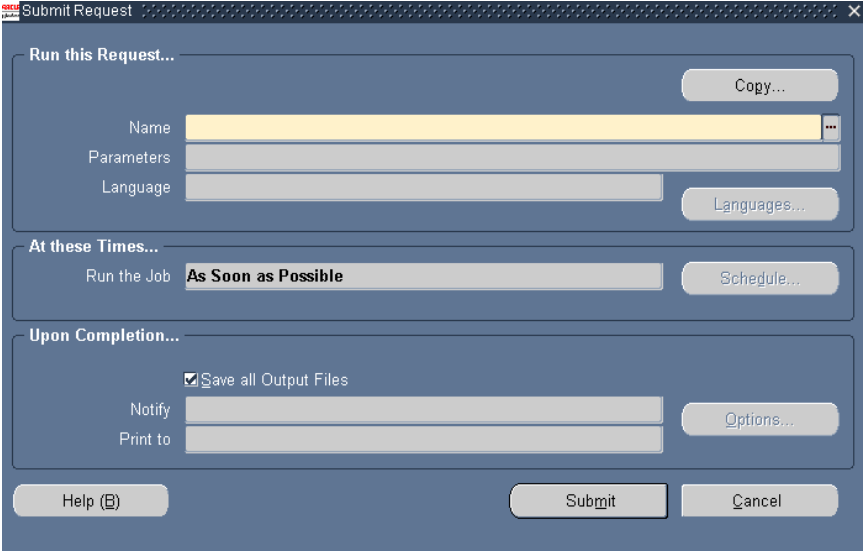
- You can view or print a number of reports within OTA. All reports are displayed below but are not available to all OTA roles and responsibilities.
- Your Component will determine if the **Submit Course Evaluation to the Employee** Report will be set to run by the OTA Training Administrator.
- The OTA Training Administrator will need to complete the **Submit One Time Event Update HR** report to run so that when a One Time Event is conducted it will flow to Oracle HR.
 - When you need reports to run automatically either daily or weekly, use Interval in the Resubmit drop-down menu under the **Run Options** Region.
- Total reports available are displayed below:



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Printing Reports and Forms, Continued

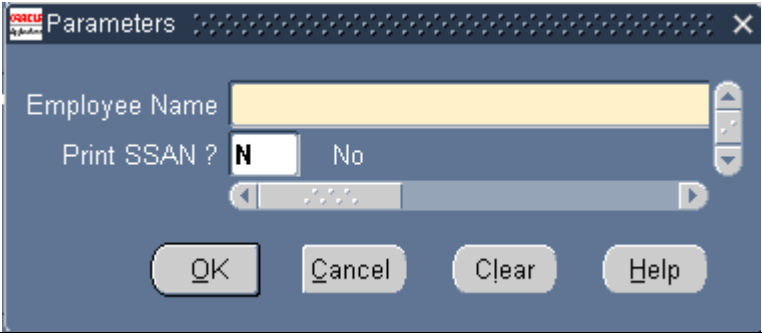
Accessing Reports This procedure uses the DD Form 1556 as the example:

Step	Action
1	Navigation Path → <i>Reports</i> → <i>Submit Report</i> → <Open> .
2	<p>The Submit a New Request window opens click the <OK> button</p> 
3	<p>The Submit Requests window opens.</p> 

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Printing Reports and Forms, Continued

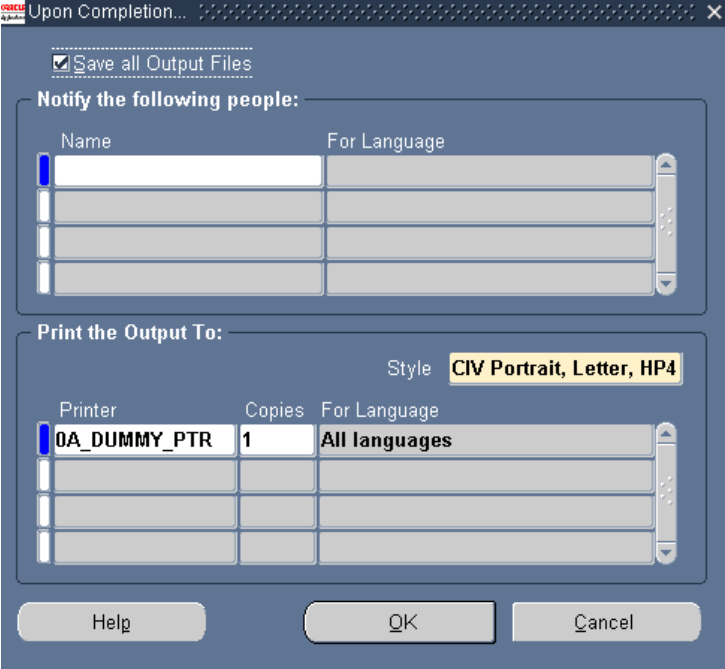
Accessing Reports (continued)

Step	Action
4	The Type data field defaults to Request . In the Name data field click the LOV icon to select Training Request Form DD1556 for example. Click the <OK> button.
5	<p>The Parameters window opens. Use the LOV to select the name (employee) to be printed on the DD Form 1556. Use the query method to query for the specific name of the employee, if not known.</p> 
5	Click the <OK> button. The Parameters data field populates. The SSN defaults to “No” for security purposes but can be changed to “Yes.”

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Printing Reports and Forms, Continued

Accessing Reports (continued)


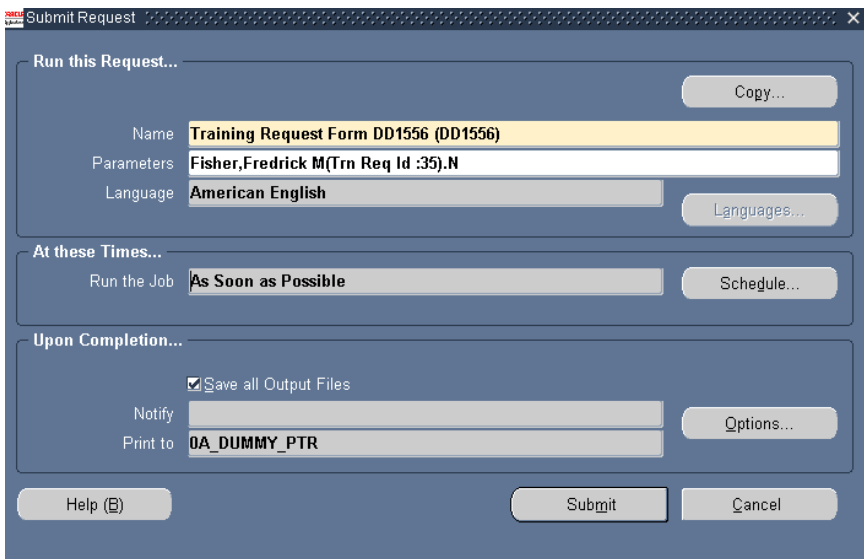
Step	Action										
6	<p>In the Print Options Region, input the following:</p> 										
	<table> <tr> <th>Data Fields</th><th>Description/Action</th></tr> <tr> <td>Copies</td><td>Defaults to 1, but you can override.</td></tr> <tr> <td>Style</td><td>Defaults to portrait but you can change to landscape.</td></tr> <tr> <td>Printer</td><td>Click on the printer your PC is associated with.</td></tr> <tr> <td>Save Output checkbox</td><td>Stores your report so you can print it later.</td></tr> </table>	Data Fields	Description/Action	Copies	Defaults to 1, but you can override.	Style	Defaults to portrait but you can change to landscape.	Printer	Click on the printer your PC is associated with.	Save Output checkbox	Stores your report so you can print it later.
Data Fields	Description/Action										
Copies	Defaults to 1, but you can override.										
Style	Defaults to portrait but you can change to landscape.										
Printer	Click on the printer your PC is associated with.										
Save Output checkbox	Stores your report so you can print it later.										
8	Click < Submit > to send the report to the printer.										
9	In the Submission History Region, the <i>Type</i> , <i>Name</i> , <i>Parameters</i> , and <i>Request ID</i> data fields populate with the type of Report submitted.										
10	Exit the window and return to the Navigator window.										

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Printing Reports and Forms, Continued

Submitting Employee/ Supervisor Evaluations


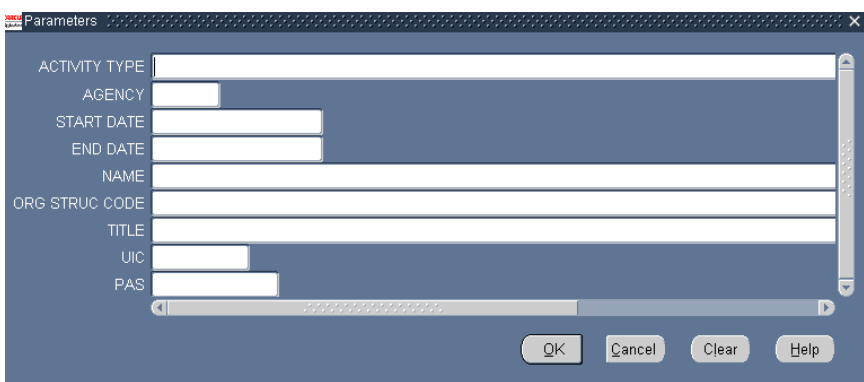
This report can only be set up by the Training Administrator.

Step	Action
1	Follow Steps 1 and 2 in Accessing Reports.
2	In the LOV, select <i>Submit Course Evaluation to the Employee</i> .
3	The Parameters window is grayed out because this is a one-time set up.
4	In the Run Options Region, select <i>Interval</i> . The Start Date defaults to the current date unless you need to change it.
5	The <i>Day(s)</i> field opens and the <i>From</i> data field populates <i>Completion</i> .
	 <p>Note: Each location can set their own time for the recurring report. For example, once it is set to recur daily, the evaluations will automatically flow to the proper inbox every day without further intervention.</p>
6	<p>Click Save. See Chapter 4, Training Completions and Evaluations, for further information.</p> <p>Example:</p> 

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Printing Reports and Forms, Continued

Managers Training Budget Report

Step	Action																				
1	Follow steps 1 and 2 in Accessing Reports.																				
2	In the LOV select Managers Training Budget Report .																				
3	<p>The Parameters window opens. Complete the data fields:</p> <p>Note: Normally, you would use only one or two parameters; e.g., Name and Start Date or Title or Activity Type.</p>  																				
	<table border="1"> <thead> <tr> <th>Data Fields</th><th>Description/Action</th></tr> </thead> <tbody> <tr> <td>Activity Type</td><td>Click the LOV to select the OPM training types.</td></tr> <tr> <td>Agency</td><td>Click the LOV.</td></tr> <tr> <td>Start Date</td><td>Enter the date needed.</td></tr> <tr> <td>End Date</td><td>Enter the date needed.</td></tr> <tr> <td>Name</td><td>Click the LOV to select employee name.</td></tr> <tr> <td>Org Struc Code</td><td>Click the LOV.</td></tr> <tr> <td>Title</td><td>Click the LOV to select Event title.</td></tr> <tr> <td>UIC</td><td>Army/Navy use.</td></tr> <tr> <td>PAS</td><td>Air Force use.</td></tr> </tbody> </table>	Data Fields	Description/Action	Activity Type	Click the LOV to select the OPM training types.	Agency	Click the LOV.	Start Date	Enter the date needed.	End Date	Enter the date needed.	Name	Click the LOV to select employee name.	Org Struc Code	Click the LOV.	Title	Click the LOV to select Event title.	UIC	Army/Navy use.	PAS	Air Force use.
Data Fields	Description/Action																				
Activity Type	Click the LOV to select the OPM training types.																				
Agency	Click the LOV.																				
Start Date	Enter the date needed.																				
End Date	Enter the date needed.																				
Name	Click the LOV to select employee name.																				
Org Struc Code	Click the LOV.																				
Title	Click the LOV to select Event title.																				
UIC	Army/Navy use.																				
PAS	Air Force use.																				
4	Click the <OK> button.																				
5	Complete the Print Options and Run Options Regions prior to clicking the <Submit> button.																				

Example:

06-JUN-00

Training Cost Report

Page 1

Name: Fuhrer, James E.**Course Title:** ADV FRAUD INVESTIG

Tuition	Books/Mat	Total Direct	Travel	Perdiem	Total	Total
	Others	Direct			Indirect	
		0	200	500	700	700
					Grand Total	700

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Viewing Reports and Forms

Viewing Reports and Forms

If you want to view a report or form without printing it, follow these steps:

Step	Action
1	In the Submit Reports window, in the Print Options Region, input a “0” for number of Copies.
2	Follow the remaining steps for Submitting a Report through clicking the < Submit > taskflow button.
3	Navigate to <i>View Report</i> .
4	The Requests window opens showing status of all reports you have submitted. Using the Current Record Indicator, select the report or form you wish to view.
5	Click < View Output >. The Form or report you selected opens. The other taskflow buttons are further explained in Module 1, Chapter 8, Reports.


Retrieving Training Cost Data

Purpose This section explains how training costs are derived in OTA and who enters the data. It will be used to retrieve cost data for planning and budgeting training dollars.

In This Section The following topics are covered:

- Who enters cost data?
- Who retrieves training cost data?
- What cost data resides in OTA?
- What cost data resides in the modern DCPDS?

See Also In this Module:


 Chapter 1, Requesting Training
 Section: Completing the Training Request Form
 Chapter 2, Administering Training
 Sections: Defining an Activity
 Scheduling an Event

Before You Begin Estimated training costs reside in four areas of OTA:

- **Activity**
- **Event**
- **Enrollment**
- **Training Request Form**

Actual training costs reside in OTA and People, Special Information Types, Completed Training in Oracle HR.

Who Does It Components will determine who will have the responsibility for entering cost data; e.g., supervisors, training monitors, resource managers, or training administrators.



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Retrieving Training Cost Data, Continued

Retrieving Cost Data There are standard reports for retrieving cost data for planning and budgeting. Cost data can be exported to spreadsheets for continuous, up-to-date cost balances.

What Cost Data Resides in OTA The following chart depicts what training cost data resides in OTA and who has the responsibility of entering data.

Costs (Estimated/Actual)	OTA Area	Who Enters
Tuition (Actual).	<u>Activity</u> - Each Course in the DoD Catalog contains tuition cost.	Pre-programmed in Course Catalog.
Books/Materials/Other Fees (Estimated costs).	<u>Event</u> - Costs are added when requesting training, including tuition, if unavailable in the course catalog.	All users.
Total Estimated Direct Cost (Includes actual tuition from the <i>Activity</i> – Course Catalog, and estimated books, materials, other fees).		
Total Estimated Indirect Cost (Includes Travel, Per Diem or PCS costs from <i>Enrollment</i>).		
Total Estimated Cost (All estimated costs).		
Actual costs. (WHS – Other Indirect cost).		

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Retrieving Training Cost Data, Continued

What Cost Data Resides in OTA (continued)

Costs (Estimated/Actual)	OTA Area	Who Enters
Travel cost (Estimated). Per Diem or PCS Cost (Estimated). Total Individual Direct Cost (Includes estimated tuition, books, and fees). Total Individual Indirect Cost (Includes travel, per diem, or PCS costs). Total Individual Cost (All costs from Activity , Event , and Enrollment).	<u>Enrollment</u> – Estimated Costs are added in Additional Delegate Booking Information.	All users.
Estimated Total Cost	<u>Training Request Form-</u> Other costs can be put on a note (either a Word attachment and forwarded through Civilian Inbox to appropriate approving office, or by Email to the approving office).	All users.



Note: The cost data, along with all the other data in **Activity**, **Event**, **Enrollment**, and **Training Request Form** will appear on the DD Form 1556.

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Retrieving Training Cost Data, Continued

**What Cost
Data Resides in
HR**

The following chart depicts what training cost data resides in HR - Person Record and who enters it.

Costs (Estimated/Actual)	HR - People	Who Enters
Estimated costs.	Special Information Types (SIT) - (Required Training).	All users.
Actual costs.	SIT - (Completed Training History).	All users.

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